

Ideal Segregated Funds – Signature Series

Switch to an Ideal Income Series within an existing Signature Series contract/account



Date:	Contract#:
Contractholder/Planholder name:	

From:		To:		Amount (\$) or Percentage (%)
Fund name	Fund number	Fund name	Fund number	

Joint Life Option
If the existing contract does not have the Joint Life Option and you wish to have it for the Ideal Income Series, you will need to provide a new application as a new contract will need to be created. (Please take note that this option is only available for non registered savings plan. The contract holder must be the annuitant)

Series Maturity Date
For the Ideal Income series, the Series Maturity Date is December 31st of the year the Annuitant turns 100 years of age (or younger spouse or common-law partner as defined by the *Income Tax Act* (Canada), if Joint Life Option).

Life Income Date (LID) (For the Ideal Income Series Only)

Life Income Date (LID) (For the Ideal Income Series Only) (DD-MM-YYYY)

If no date is selected, the following default Life Income Dates will apply:

- Registered retirement income plans: One year following the date of transfer from an RRSP or one year following the initial premium to the Ideal Income Series.
- Non-registered savings plans: Annuitant's 65th birthday
- Registered retirement savings plans: not applicable

Distributor (G.A.)/Dealer code: Advisor Code

Advisor Name (please print):

Advisor signature

I declare that I have received the information folder with all the necessary information pertaining to the Ideal Income Series.

Contractholder/Planholder signature:

Additional Comments:

You may contact us Monday through Friday 8:30 am to 5:00 pm eastern/mountain time by calling our toll-free number 1-888-841-6633. You may also contact us by email: csc@standardlife.ca